

## Requesting a Prize/Stipend/Award Item Type

Prize, Stipend and Award item types are those disbursed by the Office of Student Financial Aid and Scholarships and can pay any fees on the student account. Amounts in excess of outstanding charges may be refunded to the student.

1. Access Request Form	Navigate to the <a href="#">Item Type Request Form</a> in Quali.
2. Log in	Log in with your VUNetID and password. User identity will auto-populate the Submitter, Email address & Department fields on the form.
3. How many item types are you requesting?	Enter the number of item types being requested on this submission, which must be in the same financial entity. The maximum is 10 per submission.
4. Review Instructions, as needed	Specifically, review the Usage Option Definitions provided. If there is <b>any</b> question about which should be used for the submission, reach out to the <a href="#">Office of Student Accounts</a> (OSA) for assistance.
5. Usage	Type the first few <b>CaSe-SeNsItiVe</b> characters of the intended usage to get a list of available options and click on the proper selection. If you don't find the option you need, reach out to OSA for assistance.
6. Fund Source	If there is a POET Project number to fund the item type, choose POET. Otherwise, choose COA.
7. Item Type Description	This description will appear on student accounts and billing statements, so please be descriptive yet concise. There is a 30-character limit to this field.
8. Federal Funding	Select the appropriate option. If yes, choose the funding source from the drop-down menu.
9. Notes	Provide any additional information for Financial Aid staff in their setup of this item type or to be used for reference. This information will not be directly imported to PeopleSoft.
10. For COA Funding	<p>a. Enter the Financial Unit and click on the gray pop-up with that number when it appears. If no pop-up appears, an invalid Financial Unit has been entered.</p> <div data-bbox="743 1413 1198 1612" data-label="Image"> <p>The image shows a search interface for 'COA Fin Unit'. The search bar contains the text '15230'. Below the search bar, a dropdown menu is open, displaying '15230' as a search result. A red arrow points to the '15230' option in the dropdown.</p> </div> <p>b. Verify the provided Entity, NAC and Account are correct.</p> <p>c. Enter the Program and Activity.</p>
11. For POET Funding	<p>a. Enter the POET Project Number</p> <p>b. Select the POET Task from the drop-down menu. If there are no values in the drop-down, then the Project Number provided is not active.</p> <p>c. Verify the provided Project Org, Expenditure Type, Financial Unit, Entity, NAC and Account.</p> <p>d. Enter the Program and Activity.</p>
12. Existing item type	If an item type with the entered funding already exists, an error message will be displayed, along with the existing item type number and description.

**Existing item type found. Please revise your request or contact Student Accounts.**

Item Type

000000507001

Description

Travel Award for Grad Student

13. Correcting the form, as needed

For typographical errors: **Do not simply type over the incorrect value.** Clear the entire field and pause until the validation checker resets, removing any error message (if there is one). You may then re-enter the correct value.

To “start over” on a request line: **Clear all fields for that request line before re-entering the new information.** This allows the form integrations to reset and thereby provide the correct COA values for the new information.

To cancel an entire form and all the requests on it: Click on the “Discard” button to the left of the “Submit” button.

14. Approver

From the drop-down menu, select the correct approver for your financial area and wait for it to successfully load. Not all areas will follow the same guidelines for appointing approvers. If you’re unsure of whom to select, contact your CBO or their designee.

15. Submit

Click the “Submit” button in the upper right-hand corner of the screen. After the form is submitted, a button will appear enabling the start of a new form, if needed.

### Processing Timeline:

Upon submission, you will receive a confirmation email with instructions for tracking the status of your submission. The text of the confirmation email is below. Please note that you **will not receive** an email with your item type number.

Also upon submission, the designated Approver will receive an email alert that there is a request requiring their attention. Approved requests are loaded into PeopleSoft from 6:30 – 7:00pm nightly.

**From:** [no-reply@mail.kualibuild.com](mailto:no-reply@mail.kualibuild.com)  
**To:** [item.type.user@vanderbilt.edu](mailto:item.type.user@vanderbilt.edu)  
**Subject:** Item Type Request Submitted

Your item type request has been successfully submitted, and the designated Approver will receive an email requesting their action. Upon approval, Graduate Award item types will be available for use the following day. Item types affiliated with the Office of Student Financial Aid require additional configuration and do not have a set availability timeline.

Approved request information, including current status and assigned item type numbers, can be accessed with PeopleSoft query VU\_SF\_ITEM\_TYPE\_REQUESTS. Simply enter your VUNetID when prompted.

If you wish to review or revisit submission form, they are always accessible in the [Kuali Document Center](#).